



Filing ID #10023007

FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • 135 Cannon Building • Washington, DC 20515

FILER INFORMATION

Name: Sanjay Somabhai Patel
Status: Congressional Candidate
State/District: FL08

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2018
Filing Date: 05/15/2018

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Aspiration Bank [BA]		\$1 - \$1,000	Interest	None	None
Bank of America Accounts [BA]		\$1,001 - \$15,000	Interest	None	None
Community Credit Union of Florida Accounts [BA]		\$1,001 - \$15,000	None		
E*Trade Brokerage Account [BA]		\$15,001 - \$50,000	None		
Fidelity SEP IRA ⇒ Alphabet Inc. - Class A (GOOGL) [ST]	SP	None	Tax-Deferred		
COMMENTS: Asset sold.					
Fidelity SEP IRA ⇒ Alphabet Inc. - Class C Capital Stock (GOOG) [ST]	SP	None	Tax-Deferred		
COMMENTS: Asset sold.					
Fidelity SEP IRA ⇒ Amazon.com, Inc. (AMZN) [ST]		None	Tax-Deferred		
COMMENTS: Asset sold.					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Fidelity SEP IRA ⇒ Apple Inc. (AAPL) [ST] COMMENTS: Asset sold.		None	Tax-Deferred		
Fidelity SEP IRA ⇒ Apple Inc. (AAPL) [ST] COMMENTS: Asset sold.	SP	None	Tax-Deferred		
Fidelity SEP IRA ⇒ Berkshire Hathaway Inc. New (BRK.B) [ST] COMMENTS: Asset sold.	SP	None	Tax-Deferred		
Fidelity SEP IRA ⇒ Berkshire Hathaway Inc. New (BRK.B) [ST] COMMENTS: Asset sold.		None	Tax-Deferred		
Fidelity SEP IRA ⇒ Companhia de saneamento Basico Do Estado De Sao Paulo - Sabesp American Depositary Shares (SBS) [ST] COMMENTS: Asset sold.	SP	None	Tax-Deferred		
Fidelity SEP IRA ⇒ Fidelity Diversified International (FDIVX) [MF] COMMENTS: Asset sold.	SP	None	Tax-Deferred		
Fidelity SEP IRA ⇒ Fidelity SEP IRA (Portion Held in Cash) [IH]		\$50,001 - \$100,000	Tax-Deferred		
Fidelity SEP IRA ⇒ Fidelity SEP IRA (Portion Held in Cash) [IH]	SP	\$50,001 - \$100,000	Tax-Deferred		
Fidelity SEP IRA ⇒ Netflix, Inc. (NFLX) [ST] COMMENTS: Asset sold.	SP	None	Tax-Deferred		
Fidelity SEP IRA ⇒ Netflix, Inc. (NFLX) [ST]		\$100,001 - \$250,000	Tax-Deferred		
Fidelity SEP IRA ⇒ Starbucks Corporation (SBUX) [ST]	SP	\$15,001 - \$50,000	Tax-Deferred		
Fidelity SEP IRA ⇒ Tesla, Inc. (TSLA) [ST] COMMENTS: Asset sold.		None	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
PRO Unlimited 401(k) ⇒ Massachusetts Investors Growth Stock Fund (MIRGX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Schwab Roth IRA ⇒ Alphabet Inc. - Class A (GOOGL) [ST] COMMENTS: Asset sold.		None	Tax-Deferred		
Schwab Roth IRA ⇒ Alphabet Inc. - Class C Capital Stock (GOOG) [ST] COMMENTS: Asset sold.		None	Tax-Deferred		
Schwab Roth IRA ⇒ Amazon.com, Inc. (AMZN) [ST] COMMENTS: Asset sold.		None	Tax-Deferred		
Schwab Roth IRA ⇒ Apple Inc. (AAPL) [ST] COMMENTS: Asset sold.		None	Tax-Deferred		
Schwab Roth IRA ⇒ First Solar, Inc. (FSLR) [ST]		\$15,001 - \$50,000	Tax-Deferred		
Schwab Roth IRA ⇒ Netflix, Inc. (NFLX) [ST] COMMENTS: Asset sold.		None	Tax-Deferred		
Schwab Roth IRA ⇒ Schwab Roth IRA (Portion Held in Cash) [IH]		\$100,001 - \$250,000	Tax-Deferred		
Schwab Roth IRA ⇒ Stratasys, Ltd. (SSYS) [ST]		\$1,001 - \$15,000	Tax-Deferred		

* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Fidelity SEP IRA	Early distribution	\$2,500.00	\$32,000.00
Schwab Roth IRA	Early distribution	\$12,000.00	N/A

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Fidelity SEP IRA (SP)	Early distribution (Spouse)	\$41,000.00	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
SP	Navient	1992	Student loans.	\$15,001 - \$50,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Board Member and Officer <small>COMMENTS: Unpaid role</small>	Epic Change Inc.
Employee <small>COMMENTS: Left employment in 2016.</small>	PrO Unlimited
Consultant <small>COMMENTS: Contract ended in 2016.</small>	Bill & Melinda Gates Foundation

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

Source (Name and Address)	Brief Description of Duties
Bill & Melinda Gates Foundation (Seattle, WA, US) <small>COMMENTS: Contract ended 2016.</small>	Consulting services
PrO Unlimited (South San Francisco, CA, US) <small>COMMENTS: Employment ended 2016.</small>	Project Management

SCHEDULE A ASSET CLASS DETAILS

<ul style="list-style-type: none"> Fidelity SEP IRA Fidelity SEP IRA (Owner: SP) PRO Unlimited 401(k)
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DESCRIPTION: Held with John Hancock Retirement Plan Services, LLC

- Schwab Roth IRA

EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

Trusts: Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?

☐ Yes ☒ No

Exemption: Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption?

☐ Yes ☒ No

CERTIFICATION AND SIGNATURE

☒ I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the best of my knowledge and belief.

Digitally Signed: Sanjay Somabhai Patel , 05/15/2018